

# INDUSTRIAL KITCHEN AND LAUNDRY EQUIPMENT

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# INDUSTRIAL KITCHEN AND LAUNDRY EQUIPMENT SECTOR IN TURKEY

The Turkish industrial kitchen and laundry equipment sector has been developing significantly in recent years. The workshop-scale production sites of the mid-70s have transformed into modern production plants in the 80s.

With its large population of almost 72 million and fast-developing catering and tourism sectors, Turkey has become a production center for industrial kitchenware and laundry equipment sector.

Changing lifestyles and tastes due to industrialization and urbanization, the increase in family income, and the decrease in available time for preparing meals have resulted in a substantial development in the catering, fast food and restaurant-café-bar sectors in Turkey. More and more working people have lunch out and relatively more people have dinner out more frequently. There are about 150 thousand restaurants, cafés, pubs, night clubs and cafeterias in Turkey.

There are about 1000 catering firms in Istanbul and 35 thousand people are employed in the sector. 1.5 million people have lunch out every day in İstanbul. The foreign catering firms which began to come to Turkey at the beginning of 90s have helped the development of the sector. The sector is working to organize itself under the "İstanbul Catering Industrialists' Association" which has at present 196 members. There are about 600 catering firms in Ankara, which is the capital, and 70 in İzmir. There are about 40 large firms in the sector. Some are companies with foreign capital.

Developments and dynamism in the tourism sector have also greatly contributed to the development of the industrial kitchenware and laundry equipment sector in Turkey. Beginning in the second half of 80s the Turkish tourism sector has developed rapidly. The number of tourists who came to Turkey in 2008 was 30.9 million. Turkey had US \$ 22 billion tourism revenues in 2008. The number of tourism licensed accommodation establishments is about 3,500 in Turkey, and the number of beds was more than 1 million by the end of 2008. Some extraordinary events, İstanbul/ European Capital of Culture for 2010, Winter Olympics 2011 in Erzurum, 2010 World Basketball Championship will further develop tourism sector in coming years.

Turkey is a large, well-established and lucrative market for industrial kitchenware and laundry equipment. As a result, both domestic and foreign entrepreneurs have continued to invest in the sector.

At present, the Turkish industrial kitchenware and laundry equipment supplies industry is able to cope with both domestic and foreign demand and their preferences which change with global trends.

## Production

The average growth rate of the sector has been 10% in the last 10 years.

The volume of the market is estimated about US \$ 1.5 billion. US \$ 1 billion is for industrial kitchen equipment and US \$ 500 million is for laundry equipment.

Production capacity has been increased significantly in the sector. In the 80s the share of the production was 10% of the demand and imports were 90 %, but today the situation is reversed. In last five years, many new companies have announced investments in the sector.

Thousands of product types are produced, ranging from preparation of foods to cooking, from serving to washing for industrial kitchens, and dozens of products such as washing machines, driers, ironing presses, and carrying and collecting units for laundries. In addition to mass production, Turkish industrial kitchen and laundry equipment producers also produce special design kitchen and laundry equipment to meet the individual needs and preferences of their consumers who demand speed and comfortable mobility in the work area. It has been said that, “every kitchen and every laundry is a different world”. Some firms in the sector work on the basis of projects and the contracting of kitchens and laundries. These firms employ a team of engineers, architects and use autoCAD programs to construct turn key professional kitchens and laundries. The large companies in the sector invest in R&D in order to create new products and improve the quality of their existing products. These firms have registered the products that they have developed.

In production, steel, especially stainless steel, aluminum and plastics are used as raw material. In Turkey, stainless steel is the most-used raw material for production.

There are about 500 firms in the sector. The “Industrial Kitchen and Laundry Supplies Industrialists and Businessmen Association (TUSID)” was established in 1991 in İstanbul and has 158 member companies. According to TUSID’s survey, more than 10.000 people work in this sector.

More and more companies are getting certificates of international standards such as the ISO 9001 and CE marking of EU, and certificates of county-based standards such as DIN (Germany), NSL and UL (the USA), GOST (the Russian Fed.), STANCOCERT (Ukraine), ISCIR (Romania), CO (Bulgaria) etc.

The large companies also have a network of after-sale services both in Turkey and in the countries to which they export their products as they are conscious of the importance of after market care.

The sector supplies to the tourism sector, fast food restaurants, catering firms, restaurants, cafés, bars, patisseries, cafeterias, hospitals, public organizations, educational institutions etc. However, the major part of the sector’s turnover is from the tourism sector. According to one survey, every single bed in a newly established hotel provides a prospective investment of US \$ 700 for an industrial kitchenware company.

## Exports

It is not possible to precisely calculate the yearly total export figures of the sector by studying statistical data because there are no separate numbers in the “Harmonized Commodity Description and Coding System” for every product or product group which falls in the industrial kitchen and laundry equipment group. In other words, it is not possible to differentiate the export figures of domestic equipment from those products which have for industrial use. Nevertheless, to provide a general idea, a table of the exports of the

products or product groups in which industrial kitchen and laundry equipment are included, or assumed to be covered, is given below.

Export figures have increased steadily and exports are directed to about 100 countries throughout the world. The major destination countries are the USA, European Union Countries, the Turkic Republics of the CIS, the Russian Federation, some North African countries, Iraq, Iran, Egypt and Japan.

*Exports by Product Groups Unit (Value: \$ US 1 000)*

HS No	PRODUCTS	2006	2007	2008
392410000000	Plastic tableware and kitchenware	81.844	105.602	130.284
481830000000	Paper table covers and napkins	6.124	9.389	11.567
482360	Paper trays, plates, cups etc.	7.032	-	-
6911	Porcelain tableware	38.092	53.159	61.938
6912	Ceramic tableware	11.164	18.534	25.220
7013	Glass tableware	323.242	379.256	441.517
732111	Cooking and plate warming equipment and ovens	154.974	194.557	248.000
732393100000	Stainless steel tableware	40.776	39.530	46.760
732393900000	Stainless steel kitchenware and houseware	66.664	73.207	72.504
732394900000	Kitchenware and houseware made of iron and enameled stainless steel	13.921	16.842	16.448
732399990000	Other kitchen equipment (Work benches, knife sterilization cabinets etc.)	21.597	18.681	20.766
741819	Copper houseware and kitchen equipment and their accessories	4.395	4.116	3.503
761519	Aluminum houseware and kitchenware	38.238	53.875	44.856
820830	Knives and cutting instrument accessories for food machines and kitchen equipment	1.748	2.437	2.942
821000	Mechanical kitchen equipment (not heavier than 10 kgs) for the preparation and service of food and drinks. (Equipment for meat mincing, fruit and vegetable slicing, juice extracting, bread slicing, ice cream making; mixers, coffee and spice	817	861	1.485

	grounding mills etc.			
821110000011	Sets of table and kitchen knives	214	458	461
821191300000	Table knives with stainless steel edges and handles	344	347	276
821191800000	Table knives with stainless steel edges and handles made of materials other than stainless steel	209	252	296
8215	Cutlery	5.017	6.411	6.955
8418	Refrigerators, freezers and other cooling and freezing equipment; heat pumps	1.156.552	1.449.850	1.454.170
841850	Showcase type and other similar freezer and coolers and ice cream machines	96.019	135.551	163.915
842112000011	Drying machines ( Dry laundry capacity of less than 6 kgs)	20	15	51
842112000019	Drying machines ( Dry laundry capacity of more than 6 kgs)	306	530	361
842219000000	Dish washing machines other than household use	2.134	3.541	3.781
843810100000	Machines and equipment for bread, cookie and biscuit making	17.682	18.523	23.353
843850000000	Machines and equipment for the preparation of meats	1.956	2.187	2.395
843860000011	Machines and equipment for peeling potatoes	217	327	895
843860000012	Machines and equipment for the preparation of fruits and vegetables	1.915	1.948	3.732
845020000000	Washing machines for laundries	2.312	2.555	2.655
845110000000	Dry cleaning machines	262	498	495
845121100019	Laundry type drying machines with a capacity of not more than 6 kgs and not more than 10 kgs	91	129	72
845121900019	Drying machines with a capacity of more than 6 kgs but less than 10 kgs other than household use	109	135	156

845129000000	Other driers (Laundry capacity of more than 10 kgs)	7.732	7.753	8.933
845130	Flatwork ironers	7.199	10.203	11.819
845130309000	Ironing machines and presses	249	549	366
850940	Food grinders and mixers; fruit and vegetable presses	22.634	27.196	30.277
851410100000	Cookers and ovens for bread, pastry and cookie making	1.670	1.859	2.420
851650000000	Microwave ovens	787	1.600	1.304
851660	Other ovens; cookers, cooking plates, cooking rings, grills and frying equipment	310.398	422.377	563.808
851671000000	Coffee and tea making equipment	3.201	4.392	4.877
851672000000	Bread toasting machines	151	331	533
851679	Other electrothermal equipment for cooking and warming foods	2.534	3.563	4.096
871680009019	Trolleys	7.924	14.710	14.360

*Source: Export-Import Statistics, Undersecretariat of Foreign Trade*

## MAJOR TRADE FAIRS HELD IN THE SECTOR

- Hotel Equipment, Antalya Fair Center, in Antalya, 15-18 January 2009
- HOTEL, PUB, CAFÉ, RESTAURANT 2009, Hotel, Pub, Café, Restaurant Systems, Decoration and Equipment, Lütfi Kırdar International Congress and Exhibition Palace, in Istanbul, 26-29 March 2009
- TUREX 2009, Hotel, Pub, Restaurant Equipment, Club Pineta Hotel, in Muğla, 11-14 March 2009
- Hotel 2009, Hotel Equipment and Food, Bodrum Municipality, in Muğla, 08-11 April 2009
- INTERHOTEL HOTEQ 2009, Hotel Equipment, TUYAP Fair and Congress Center, in Istanbul, 17-21 December 2009